2. PROCEDURES

In this section, you will find information on how to:

a. Develop Procedures For Information Verification and Clearance/Approval

Background: Importance of Information Verification and Clearance/Approval Procedures[1]

One quick way to lose credibility as an organization is to be unable to release *accurate* information quickly, particularly in an emergency situation. Before information is released, it should be verified and cleared by all responsible parties. Determining your agency's verification and clearance procedures in advance will go a long way toward avoiding errors in the confusion that often arises during an emergency.

It's difficult to delegate clearance. Managers should be realistic about the time it will take and build that time into their duties.

Steps for Verifying Information and Obtaining Clearance/Approval

1. Prioritize what information is "need to know" versus "want to know" and get moving on what must be answered first. If an answer to a "need to know" question is not formulated, give the media and the public information about the process or system to get that answer.

2. When possible, three people should officially clear a document before it is released from the organization:
    a. The communication director responsible for your organization's reputation;
    b. The director whose job is on the line if the information is wrong or counter to policy; and
    c. A subject matter expert who is fast and infallible on the subject.

3. Don't forget to get clearance from your higher authority as required. As a courtesy, ensure that response partners know which new information you are planning to release. Have the mechanism in place to give a courtesy check to response agencies with a stake in your release.

4. Clear all information simultaneously and in person, whenever possible. Unless you can get the primary clearance authorities in one room with the door closed and no phone on the hook, make three copies; take one to each person and stand there while they review and approve the document. Point out any part of the document you believe needs their careful consideration. Ask if they would be comfortable seeing this as the headline of the next day's local paper. Reinforce that the information you've compiled and are attempting to get cleared answers important questions from the public, media, or partners *or* are in response to troubling trends from your own analysis of where the subject is headed.

[1] Source: United States Centers For Disease Control and Prevention. 2002. *Crisis and Emergency Risk Communication.*

5. Educate everyone involved in the development and release of information about the steps to clear a document and the expectation for time from development to release. Help responsible authorities understand that no release is worse than an incomplete release. Get "need to know" information out the door fast. Get "want to know" released as soon as possible without straining relationships with authorities who must clear new information.

6. The key to this area of emergency response is to have as much information on a topic prepared and pre-cleared as is possible. However, make sure that pre-developed information is sensitive to a crisis situation. When people are experiencing a public health threat, the words you choose will naturally have to be more careful—choose them that way from the start.

Tools for Verifying Information and Obtaining Clearance/Approval

In the following pages, you will find the following tools to help you plan who will be responsible for communicating with the media, the public, and partners.

1. Verification Checklist: Use the questions on this checklist as a guideline to verify whether the situation is a legitimate emergency, who is involved in the situation, and what sort of response is needed.

2. Clearance Worksheet Template: Use this worksheet to plan what information needs to be released, who should be involved in information development, and who needs to approve information before it is released. Acquire signatures from all Approvers.

Verification Checklist

Use the questions on this checklist as a guideline to verify whether the situation is a legitimate emergency, who is involved in the situation, and what sort of response is needed.

1. **Verify that the emergency is real** by asking three initial questions when a potential for a crisis is first reported:
   - ☐ From where did the information originate?
     - → Formal channels of communication (e.g., HHS or Epi-Aid)
     - → Informal (e.g., call from local health official)
     - → Rumor (e.g., e-mail chain)
   - ☐ How plausible is the characterization of the event?
   - ☐ Is the information consistent with other sources?

2. **Evaluate the need for public communication** by answering the following questions:
   - ☐ Is the event and/ or risk to the public contained within one small locale or spread across multiple jurisdictions?
   - ☐ Is the locale in a major media market or in an area with few media outlets?
   - ☐ Is the biological agent highly infectious or difficult to transmit?
   - ☐ Is the biological agent:
     - → Extremely deadly?
     - → Relatively benign?
     - → Dangerous only for specific, vulnerable subgroups (including children and special populations)?
   - ☐ Is the human outcome of the disease uncertain (e.g., long-term health effects)?
   - ☐ Is the event a legitimate public health emergency requiring swift and widespread public education to prevent further morbidity and mortality (e.g., multistate *listerosis* outbreak)?
   - ☐ Is there any indication of criminal/terrorist activity?
   - ☐ Is there/will there be an ongoing criminal investigation?
   - ☐ What is the extent of media coverage, if any? Are media reports accurate? (Including information posted on the Internet)
   - ☐ Have there been inquiries from the public about the event?
   - ☐ Is the interest generated because of the event's novelty versus a legitimate public health concern?
   - ☐ Is there a product, service, or industry potentially involved?
   - ☐ Are there sensitive international trade or political relations involved?
   - ☐ Is this event within the scope of responsibility for your organization? Are you/should you be involved?
   - ☐ Is the state or city health department at the epicenter of the event well equipped to manage a media response of this magnitude?

- ☐ How and by whom is the situation being managed programmatically and/or scientifically?

3. Based on your assessment, you must determine the following:
   - ☐ Should initial media and public response hours of operation be:
     - → 10 hours a day?
     - → 12 hours a day?
     - → 20 hours a day?
     - → 24 hours a day?
   - ☐ Should initial media and public response operate:
     - → 5 days a week?
     - → 6 days a week?
     - → 7 days a week?
   - ☐ Will your staff be expected to travel?
   - ☐ Will jurisdiction over the information to be released be shared?

Clearance Worksheet Template

Use this worksheet to plan what information needs to be released, who should be involved in information development, and who needs to approve information before it is released. Acquire signatures from all Approvers.

Situation: ____

____

____

____

Date: ____

Time Frame to Release Information: ____

1. Identify information to be released

☐ Identify "need to know" information

____

____

____

____

____

What materials and information have already been developed?

1. ____
2. ____
3. ____
4. ____
5. ____

Who is/was/needs to be involved in information development?

1. ____
2. ____
3. ____
4. ____
5. ____

2. Acquire clearance through all necessary parties

☐ Communication Director
Name:____
Concerns/Comments:
____
____
____
____
____

☐ Director responsible for information
Name:____
Concerns/Comments:
____
____
____
____
____

☐ Subject Matter Expert:
Name:____
Concerns/Comments:
____
____
____
____
____

☐ Response partners (if applicable):
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____

b. Develop Procedures to Coordinate with Important Stakeholders and Partners (e.g. Public Health Regions; Law Enforcement)

Background: Importance of Developing Procedures to Coordinate with Important Stakeholders and Partners

In the event of a serious public health emergency, a local board of health would likely be working with state and federal agencies, rather than alone. Both state and federal agencies, in turn, might need to rely on a range of professional and community supporters during an emergency. It is important to develop effective working relationships with a wide variety of stakeholders, including the media, public officials, key experts, community organizations, members of special populations, and the general public. These relationships serve a dual purpose. First, the process of developing them can help build trust and open lines of communication between the public and public health officials. Second, during a bioterrorist attack or other public health emergency, it will be easier to let people know that a plan is in place to deal with the incident and where to turn for information.

Steps for Developing Procedures to Coordinate with Important Stakeholders and Partners

1. Consider different types of public health emergencies. What is likely to be the procedure for responding to the emergency?

2. For each type of emergency you identify, determine the stakeholders and partners with whom you would need to coordinate and communicate to respond to the emergency. These could include:
    a. State public health department
    b. State emergency management agency
    c. Governor's office and other local public officials
    d. Federal agencies (CDC, FBI, FEMA)
    e. Local first responders (hospital, fire, law enforcement, emergency management personnel)
    f. Local media
    g. Local special populations (including tribal governments)
    h. Local community agencies/departments (including schools, American Red Cross, Salvation Army)

3. Develop relationships with all identified parties <u>in advance</u>.
    a. Know in advance WHOM you would contact if an emergency were to occur and HOW you would contact them. Develop a call-down list in case your primary contact is not available.
    b. Know what information each party would need from you and what information you would need from them.

Tools for Developing Procedures to Coordinate with Important Stakeholders and Partners

In the following pages, you will find these tools to help you plan who in your organization will be responsible for communicating with the media, the public, and partners:

1. Stakeholders/Partners Contact List Template: Use this contact list to keep track of each partner you have contacted. It may be useful to file agencies in the same category (e.g., local emergency response, special populations) together for convenience.

Stakeholders/Partners Contact List Template

Use this contact list to keep track of each partner you have contacted. It may be useful to file agencies in the same category (e.g., local emergency response, special populations) together for convenience.

Agency: ____

Type of Agency/Category: ____

Contact Name	Work Phone	Home Phone	Cell Phone/Pager	Function(s)/Responsibilities

c. Develop Procedures to Secure Needed Resources (Space, Equipment, People) to Operate the Public Information Operation During a Public Health Emergency 24-Hours-a-Day/7-Days-a-Week, If Needed

Background: Developing Procedures to Secure Needed Resources

During an emergency situation, it is imperative that organizations not only manage the crisis, but also maintain daily operations. Establishing an Emergency Operations Center (EOC) may provide a mechanism that allows your agency to both manage the crisis and meet your ongoing public health responsibilities. Preparing for an EOC, particularly for a sustained period, requires significant up-front planning.

Steps for Developing Procedures to Secure Needed Resources[2]

1. Most public information officers are accustomed to working with little or no budget. Based on your needs assessment, identify your needs and the procurement mechanisms for:
   a. Space
   b. Equipment
   c. People

2. Try to connect with a part of your organization that has logistical savvy. Take the time to learn how to access resources quickly in an emergency.

3. Put that information in your plan. Don't wait for the emergency to start telling emergency response commanders what you need. Integrate that information into the planning and create agreements in advance. Make sure that the EOC plans indicate your space, people, telephone lines, etc. needs. Over-plan in this area.

4. At the local level, a Joint Information Center (JIC) may be the answer to your resource needs. If you need to work with other local and/or non-government organizations to operation an information center, obtain agreements in advance.

Tools for Developing Procedures to Secure Needed Resources

In the following pages, you will find these tools to help you develop procedures to secure needed resources.

[2] Source: United States Centers For Disease Control and Prevention. 2002. *Crisis and Emergency Risk Communication*

1. Resource Planning Worksheet: Use this worksheet as a guideline to plan how your agency will acquire needed resources—including space, people, and equipment—to staff and operate an EOC or a media center.

Resource Planning Worksheet[3]

Use this worksheet as a guideline to plan how your agency will acquire needed resources—including space, people, and equipment—to staff and operate an EOC or a media center.

Space

1. Staff responsible for acquiring space:
   a. (Name)______________________________ (Phone)___________________
   b. (Name)______________________________ (Phone)___________________
   c. (Name)______________________________ (Phone)___________________

2. Considerations for Locating Space:
   - Do you need space to operate your communication teams outside the EOC? Do you need a place to bring media on site (separate from the EOC)?
   - Do you need a quiet space to quickly train spokespersons?
   - Do you need space for team meetings?
   - Do you need space for equipment exclusive for your use as a communications team?

3. Purpose: What will the space be used for?

____
____
____
____

4. Details: What kind of space is needed?

- ❑ Size:
- ❑ Capacity (people):
- ❑ Location:
- ❑ Access:
- ❑ Security:
- ❑ Furnishing:
- ❑ Equipment capabilities (phone lines, electricity etc):
- ❑ Other:

[3] Source: United States Centers For Disease Control and Prevention. 2002. *Crisis and Emergency Risk Communication*

People

1. Staff responsible for recruiting and training people:
   a. (Name)______________________________ (Phone)____________________
   b. (Name)______________________________ (Phone)____________________
   c. (Name)______________________________ (Phone)____________________

2. Considerations for Recruiting and Training Staff:

- Identity people qualified to take phone inquiries; consider staff from throughout Identify and train people to staff a 24/7 public and media information center.

- Identity people qualified to take phone inquiries; consider staff from throughout your organization as well as in partner organizations.

- Consider recruiting volunteers from the medical community to help with phones, especially infectious disease specialists.

- You can never have too many support staff. Train them, give them respectful titles, and reward them.

3. Responsibilities that need to be planned for:

Name	**Contact**
Staff Phone Lines	
1	
2.	
3.	
4.	
Media Crew	
1.	
2.	
3.	
4.	
Subject Matter Experts	
1.	
2	
3.	
4.	
Other	
1.	
2.	
3.	
4.	
Other	
1.	

2.	
3.	
4.	
Other:	
1.	
2.	
3.	
4.	

4. Contract Staff

Responsibility	**Name**	**Phone**
Media Newswire	1. 2. 3. 4.	
Radio Newswire	1. 2. 3. 4.	
PR	1. 2. 3. 4.	
Writers	1. 2. 3. 4.	
Administrative Support	1. 2. 3. 4.	
Phone systems	1. 2. 3. 4.	

Equipment and Supplies:

1. Staff responsible for acquiring space:
   a. (Name)______________________________ (Phone)____________________
   b. (Name)______________________________ (Phone)____________________
   c. (Name)______________________________ (Phone)____________________

2. Equipment checklist:

☐ Fax machine (number that's preprogrammed for broadcast fax releases to media and partners)

☐ Web site capability 24/7. Attempt to post information within 2 hours—some say within 10 minutes

☐ Computers (on LAN with e-mail listservs designated for partners and media)

☐ Laptop computers

☐ Printers for every computer

☐ Copier machine (and backup)

☐ Tables—lots of tables

☐ Cell phones/pagers

☐ Visible calendars, flow charts, bulletin boards, easels

☐ Designated personal message board

☐ Small refrigerator

☐ Paper

☐ Color copier

☐ A/V equipment

☐ Portable microphones

☐ Podium

☐ TVs with cable hookup

- ☐ VHS VCR
- ☐ CD–ROM
- ☐ Paper shredder

3. Supplies Checklist:

- ☐ Copier toner
- ☐ Printer ink
- ☐ Paper
- ☐ Pens
- ☐ Markers
- ☐ Highlighters
- ☐ Erasable markers
- ☐ FedEx and mail supplies
- ☐ Sticky notes
- ☐ Notebooks
- ☐ Poster board
- ☐ Standard press kit folders
- ☐ Organized B-roll in beta format (keep VHS copies for meetings)
- ☐ Formatted computer disks
- ☐ Color-coded everything (folders, inks, etc.)
- ☐ Baskets (to contain items that you're not ready to throw away)
- ☐ Organizers to support your clearance and release system
- ☐ Expandable folders (with alphabet or days of the month)

- ☐ Staplers (lots of them)
- ☐ Paper punch
- ☐ Three-ring binders
- ☐ Organization's press kit or its logo on a sticker
- ☐ Colored copier paper (for door-to-door flyers)
- ☐ Paper clips (all sizes)
- ☐ Tape (be creative)

4. Services/Mechanisms:

- ☐ Phone service (including hotlines)
- ☐ Fax (including broadcast pre-programmed fax)
- ☐ E-mail (including listserv)
- ☐ Emergency response vehicles
- ☐ Mail capabilities (including special delivery)

Contracts and Memoranda of Agreement

Remember to obtain and file contracts and agreements for any external resources, including:

- ☐ A media newswire
- ☐ A radio newswire
- ☐ Writers or public relations persons who can augment your staff
- ☐ Administrative support
- ☐ A phone system/contractor that can supply a phone menu that directs the type of caller and level of information desired:
    - General information about the threat
    - Tip line listing particular actions people can take to protect themselves
    - Reassurance/counseling
    - Referral information for health care/medical facility workers
    - Referral information for epidemiologists or others needing to report cases
    - Lab/treatment protocols
    - Managers looking for policy statements for employees